

A GUIDE FOR STRATEGIC PLANNING

This resource is designed to help clubs undertake strategic planning and build a development plan.

All Clubs should undertake Strategic Planning every five years. To run a club without a Strategic Plan or a Development Plan is like embarking on a car-journey with no roadmaps.

There are all sorts of plans a club can have, but most of them come under an overall Strategic Plan (sometimes known as a Development Plan or a 5-Year plan or similar). Some of the more common plans are defined below.

Strategic Plan : Developed out of a major Strategic Planning Process, this is the major document showing where the club is headed in the next 5 years or so, what objectives it is looking to achieve, and how. Who will implement those programs, by when, at what cost and measured by what means. Within the Strategic Plan there will be other, more specialised plans.

Business Plan : often confused with a Strategic Plan, the business plan looks at the finances of the club : how they are managed, how to raise revenue and account for expenditure. Naturally money is critical to development so the Business Plan will stem from the Strategic Plan once the Goals and Strategies of the club have been defined.

Recruitment Plan : as the name suggests, is the collection of ideas, strategies and targets for increasing the numbers within the club. These can be playing numbers and/or social members. It will be quite closely linked to the ...

Marketing Plan : which will help identify the key markets for recruitment and fundraising and how to get the club's name and good reputation out into the community awareness.

Specialised Plans : these include plans for developing club house facilities and playing fields, junior players, sponsorship opportunities, club

morale and spirit, member retention, planning for committee succession and player development, and all form distinct parts of the Strategic Plan.

THE PLANNING PROCESS

Critical to any Strategic Plan is the planning process. Probably more has been written about Strategic Planning than any other topic in Club Administration and there is a wealth of resources already available to clubs to guide them through this process. A list of useful websites and resources is included at the end of this guide.

Strategic Planning should include a cross-section of members and stakeholders but it is a mistake to think that a large number of participants will lead to a good strategic plan. In fact a group of twelve key, motivated participants will produce a much better plan than an entire club's input.

To be effective, planning sessions must be dedicated meetings for the sole purpose of developing a Strategic Plan. How that session is conducted is up to the needs of the club however. A single full day of planning can produce the same effective results as a series of smaller sessions over the space of a few weeks (eg after training when key members are already present at the clubrooms)

For the most efficient and productive planning session, it is important to engage an experienced, independent and neutral person to act as facilitator. There are many professional Strategic Planning facilitators

around, however SA Rugby Union, through the Club Support Manager, provides this service to clubs free of charge.

WHAT IS INVOLVED ?

A good facilitator should set out the rules of the session from the start. These should be designed to ensure that everyone is given the chance to feel comfortable expressing their views without fear of ridicule or retribution. Old failings should be discarded and the group should only look towards future goals.

Almost all Strategic Planning follows a long-established method :

1. Defining

- Mission** : Why does the club exist ?
- Vision** : What do we want to be ?

These two concepts become the corner-stones for planning and gives the process something to focus upon achieving.

2. Analysing (SWOT)

- Strengths
- Weaknesses
- Opportunities
- Threats

By analysing these four areas, the club is forced to look at itself critically and face some hard realities. But the strength of a club is in knowing its weaknesses. And it is not uncommon for an opportunity to also be a threat or a weakness to also be a strength.

3. Goal Setting

This is where the club sets its broad objectives such as increasing player numbers, more younger members on the committee, better clubroom facilities increasing club revenue, establishing a junior team etc

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Goal setting should be almost limitless and members should be encouraged to think beyond what would normally be reasonable.

Goals should be quite broad and results based. The chance to refine those goals comes later.

4. **Priority Setting**

It is foolish to think that all goals can be achieved with the current resources in a short space of time. Therefore, goals must be prioritised. This is done in a combination of two ways :

- a) Urgency and
- b) Resources availability

SA Rugby has a Priority Matrix that will help Clubs prioritise its goals and needs to then focus on ...

5. **Strategy Development**

This is the part of the process where the critical goals are defined and the strategies to achieve them are created.

Brainstorming is probably the best method and this can be done in groups or as a whole, and often leads to more and more innovative ideas and builds great enthusiasm. No idea is silly.

6. **Task Identification**

The nuts and bolts of the process whereby the best strategies are identified and the implementation of those strategies must now be assigned to a group or individual.

All tasks must be :

Specific
Measurable
Achievable
Realistic
Time-bound

And an inability to reach the targets should not be seen as a failure but as an area which needs to be better analysed and supported.

It is important to break tasks down into manageable units. It may be possible for one person to handle four or five different tasks, whereby others may only have time to handle one or two.

By breaking the strategies down, the whole task does not look as daunting.

It is also vitally important to know who in your club has what skills and to tailor the tasks to the talents you have identified. People are generally most willing to undertake tasks they are comfortable with, and they are most comfortable with tasks they already have some skill in.

7. **Ongoing Review and Support**

The Development Coordinator and the President should continually review the progress of the Strategic Plan.

Every club committee meeting should **start** with a report about development, not discuss it in "Any Other Business" if there is time (and focus). The Strategic Plan is about what the club is going to do not what happened last month .. and the reality is, the future of the club is more important than its past.

8. **Major Review**

Every strategy must be time bound and that timeframe must be written into the plan. At the end of that time period, the task should be assessed and its progress reported upon. If proper on-going review has taken place then there should be no surprises and, if adequate support has been given, then the task should have been pretty much completed.

The Strategic Plan itself needs to be reviewed every 5 or so years. Focus changes, priorities shift and hopefully, the club has developed in such a positive way, that even greater goals are now achievable.

A full review of the plan needs to be undertaken and the original plan needs to be built upon.

The process is exactly the same .. it's just that now, if your first plan was successful, your club's potential is now much, much greater.

Useful resources :

- SA Rugby Union Club Support Manager
- Australian Sports Commission's 'Club Development Network' :
www.ausport.gov.au/clubs/index.asp